

AI READINESS CHECKLIST FOR CONTACT CENTERS

Getting your contact center ready for AI requires careful planning. This checklist will help you develop a plan to seamlessly integrate AI into your operations.

DEFINE GOALS & STRATEGY

- ☐ Define objectives, KPI, and expected ROI
- ☐ Identify pain points or use cases that AI can address
- ☐ Identify a specific, straightforward use case to begin with
- ☐ Establish a budget and allocate resources

REVIEW RISKS & COMPLIANCE

- ☐ Form a committee that includes HR, Legal, IT, and Security stakeholders
- ☐ Review data privacy and security protocols. (Ensure compliance with regulations like GDPR, HIPAA, CCPA)
- ☐ Evaluate vendor reliability, security practices, and long-term viability

ASSESS YOUR CURRENT INFRASTRUCTURE

- ☐ Evaluate existing technology infrastructure for AI compatibility
- ☐ Assess the scalability of current systems to handle AI workloads
- ☐ Evaluate your workforce's existing skill set and their attitudes toward the implementation of AI.
- ☐ Evaluate current reporting and analytics capabilities (can they track AI performance and impact?)
- ☐ Review business policies, data quality, and knowledge articles that AI will need to train on

EXPLORE AI SOLUTIONS & VENDORS

- ☐ Research available AI solutions relevant to contact centers. (e.g., Real-Time Transcription, IVA, Agent Assist, Automated Agents, etc)
- ☐ Identify vendors and evaluate their offerings. Consider features, pricing, integration capabilities, and support
- ☐ Test the solution with a Proof of Technology (POTs), Sandboxing, or Discovery
- ☐ Decide whether you have the resources to buy or purchase your technology

PLAN FOR IMPLEMENTATION

- ☐ Develop a detailed blueprint for implementation
- ☐ Train your employees or collaborate with a vendor for a seamless migration
- ☐ Implement routing to ensure customers connect with the right support